

# Option A

## How to contribute to your RRSP account in *My Profile*?

If you don't have an RRSP account with UNI, you must open one first. See the tutorial on "How to open an RRSP account in *My Profile*." (Option C)

This RRSP account is a basic account. For more options, please refer to the "Contributing to other types of RRSP accounts" section. (Option B)

### Steps:

1. Log in to *My Profile*.
2. On the home page, in the *My financial summary* section, click the **arrow** and then go to the **Accounts section**.
3. Click **Registered investments**.
4. Click your **RRSP** line.
  - A. All your RRSP account types will be displayed.
5. To the right of the desired RRSP account type, click **Contribute**.
6. Enter the desired amount.
7. In the *Schedule* section, select **Once** or **Recurring**.
  - A. **Once option**: select the payment date and click **Continue**.
  - B. **Recurring payment option**: choose the frequency (e.g. every four weeks), choose the start date, and then choose the number of times (e.g. twice).
8. Click **Continue**.
9. On the confirmation page, check the information you entered, and then click the **confirmation box**.
10. Click **Confirm**.



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# Option B

## Contributing to other types of RRSP accounts

### High interest RRSP savings account

The High interest RRSP savings account provides you easy access to your money and a higher interest rate. Your funds remain available and there's no term.

### Term savings - RRSP account

Term savings - RRSP account provide a better return. The principal is guaranteed and the interest is determined when the account is opened.

If you don't have an RRSP account with UNI, you must open one first. See the tutorial on "How to open an RRSP account in *My Profile*." (Option C)

#### Steps:

1. Log in to *My Profile*.
2. On the home page, in the *My financial summary* section, click the **arrow** and then go to the **Accounts** section.
3. In the *Registered investments* section, click **Open an account**.
4. A window will open. Answer **Yes** or **No** to the tax residency status question.

5. Click the account type **High interest RRSP savings**.
6. Click the **plan to link**, then click **Open an account**.
7. Click **Continue**.
8. An electronic document will open. Please read and accept the document by checking off **the items to sign** (green button).
9. Click **Done**.
10. Your document is now signed. To close it, click the **X**.
11. Click **Done**.

5. Click the account type **Term savings - RRSP**.
6. Enter the initial deposit amount and the term (in years).
7. Click **Continue**.
8. Click the plan to link, then click **Open an account**.
9. Click **Continue**.
10. An electronic document will open. Please read and accept the document by checking off **the items to sign** (green button).
11. Click **Done**.
12. Your document is now signed. To close it, click the **X**.
13. Click **Done**.



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# Option C

## How to open an RRSP in *My Profile*

This is the first step in opening an initial RRSP account on *My Profile*. If you already have an RRSP account with UNI, please skip this step.

### Steps:

1. Log in to *My Profile*.
2. On the home page, in the *My financial summary* section, click the **arrow** and then go to the *Accounts* section.
3. In the *Registered investments* section, click **Open an account**.
4. A window will open. Answer **Yes** or **No** to the tax residency status question.
5. Click the account type **RRSP - Retirement savings plan**.
6. Click **Open an account**.
7. You will need to designate a beneficiary.
  - A. Option *No named beneficiary, see will*: skip to step 8.
  - B. *Designate beneficiary(ies)* option: enter the first name, last name, relationship and allocated percentage. To add one or more additional beneficiaries, click **Add** and then **Add more**. Next, repeat the steps and click **Continue**.

Note: to name more than six beneficiaries, please make an appointment or contact 1-888-359-1357. The total allocated percentage must be equal to 100.

8. Choose your statement preference (online or paper), then click **Continue**.
9. Click **Continue** again.
10. An electronic document will open. Please read and accept the document by **checking off the items** to sign (green button).
11. Click **Done**.
12. Your document is now signed. To close it, click the **X**.
13. Click **Done**.

Once you've opened your RRSP account, you are ready to contribute.



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